

LeanData Attribution

Opportunity & Campaign Views Setup
Guide



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Overview

The following will walk you through the setup off LeanData Attribution Opportunity and Campaign Views. This will enable the following:

- Allows marketing to measure campaign influence across all marketing touch points, including leads and contacts not directly associated to an opportunity
- Displays relevant marketing touches on an opportunity

Functionality includes:

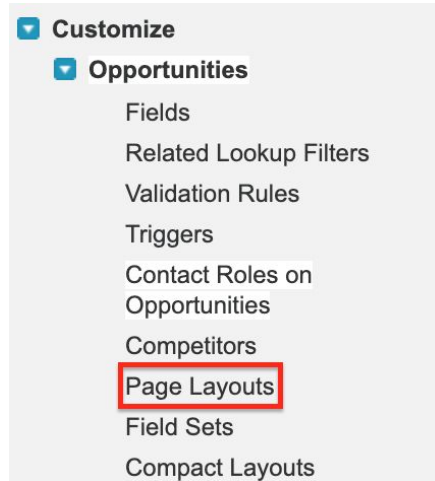
- View on campaign object to see all marketing touches
- View on opportunity object to relevant campaign touches related to that opportunity.

Overall installation process includes:

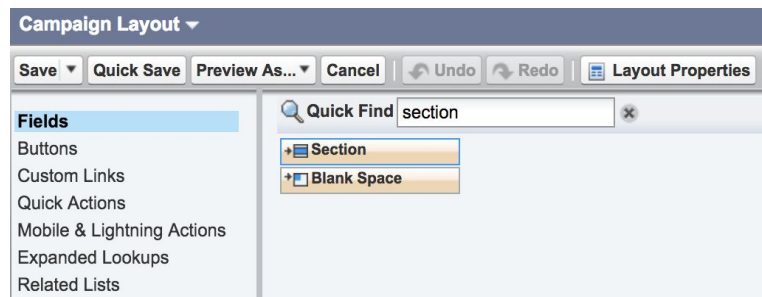
1. Assumes LeanData managed app has already been assigned from AppExchange
2. Assumes user has already Run the Attribution Job to populate data in the LeanData Marketing Touch Object
3. Add LeanData view on campaign and opportunity layouts
4. Assign permission set to users

Set Up In Opportunity Page Layout

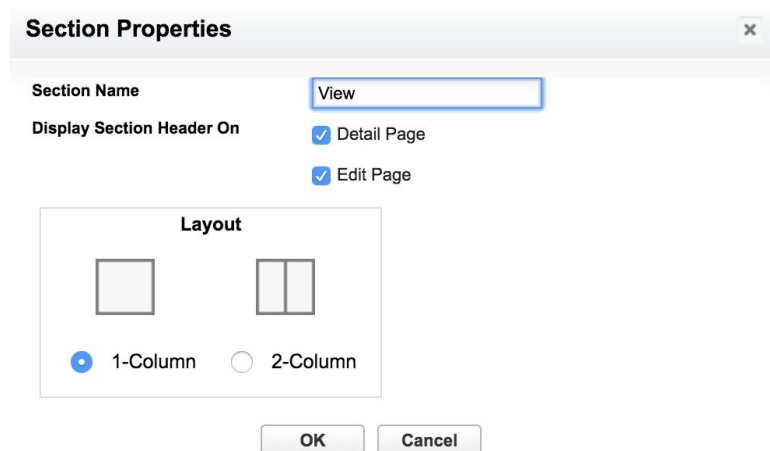
1. SFDC Admin goes to Set Up → Opportunities → Page Layouts.



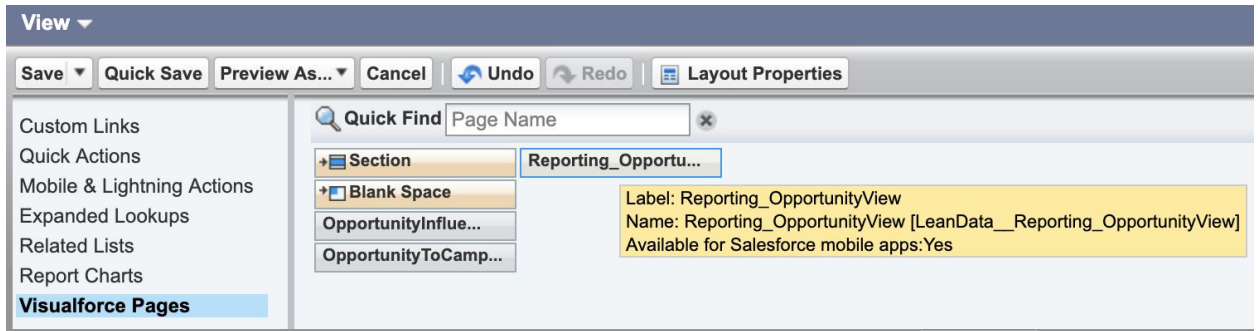
2. Click "Edit" on your desired Opportunity Layout to make changes.
3. Drag and drop the "Section" field into the Opportunity Layout.



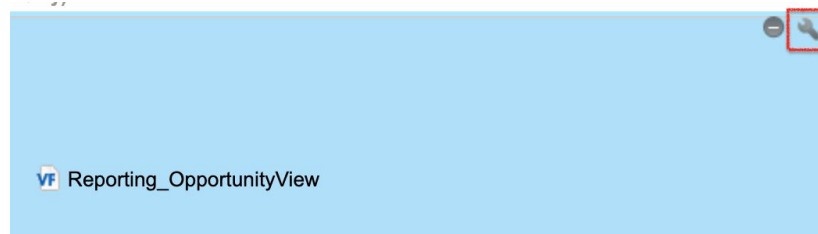
4. Create new section as a 1-Column layout.
5. Label it as "View," or something similar and click OK.



6. Back in the Opportunity Layout Editor, select "Visualforce Pages" on the list on the left.
7. Drag the "Reporting_OpportunityView" into the new LeanData section you just created



8. Hover over your new Visualforce Page on the Opportunity Layout and select the wrench icon in the upper right to edit height of view to 460 pixels.



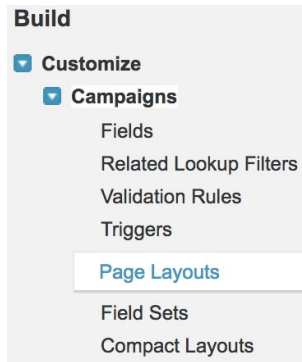
Visualforce Page Properties

Width (in pixels or %)	<input type="text" value="100%"/>
Height (in pixels)	<input type="text" value="460"/>
Show scrollbars	<input type="checkbox"/>
Show label	<input type="checkbox"/>

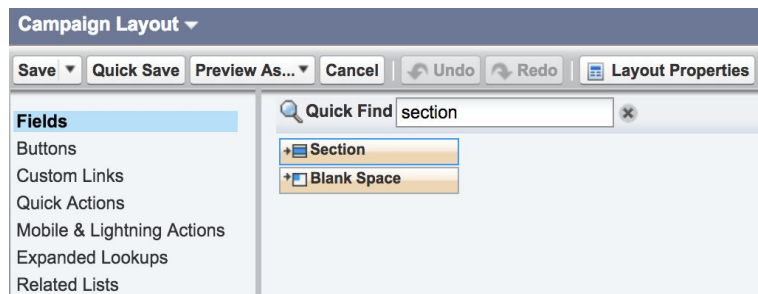
9. Hit OK and then save.

Set Up In Campaign Page Layout

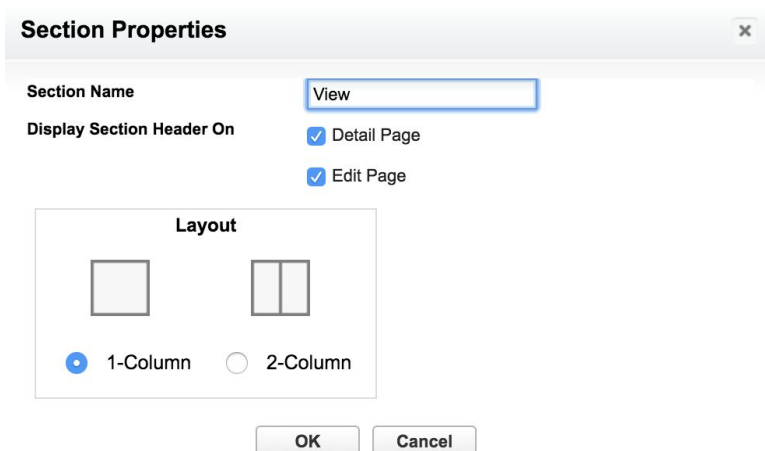
1. SFDC Admin goes to Set Up → Campaigns → Page Layouts.



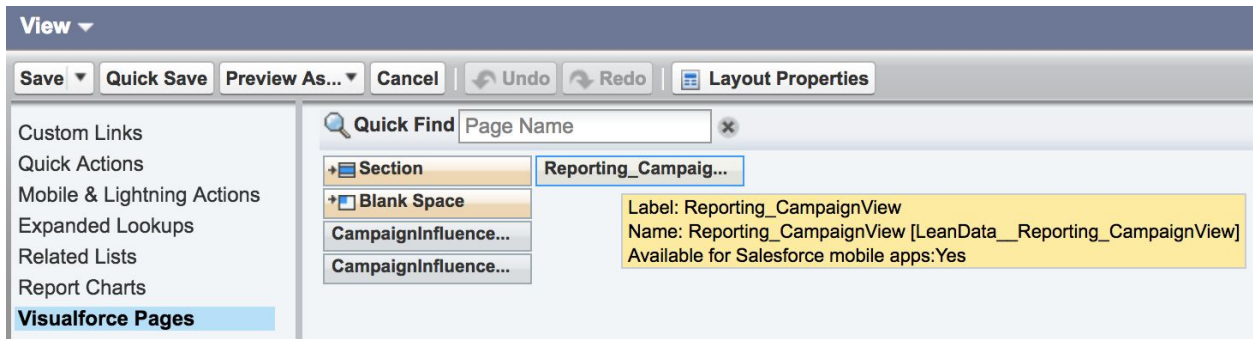
2. Click “Edit” on your desired Campaign Layout to make changes.
3. Drag and drop the “Section” field to the Campaign Layout table.



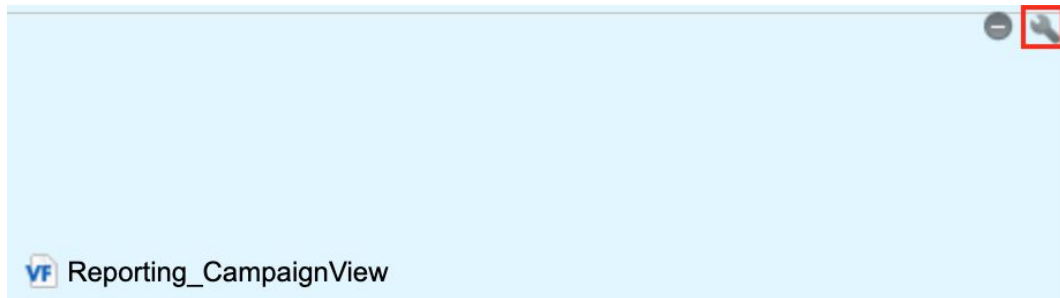
4. Create new section as a 1-Column layout.
5. Label it as “View,” or something similar and click OK.



6. Back in the Campaign Layout Editor, select “Visualforce Pages” on the list on the left.
7. Drag the “Reporting_CampaignView” into the new LeanData section you just created.



8. Hover over your new Visualforce Page on the Campaign Layout and select the wrench icon in the upper right to edit height of view to 550 pixels.



Visualforce Page Properties [X]

Width (in pixels or %)	<input type="text" value="100%"/>
Height (in pixels)	<input type="text" value="550"/>
Show scrollbars	<input type="checkbox"/>
Show label	<input type="checkbox"/>

9. Hit OK and then save.